

Section Overview

Introduction This section provides you with the necessary procedures for annual verification of entitlements, statement of creditable service, security clearances, and information regarding the PDIF and PDE.

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Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts

Introduction Annually during the month of November, members must verify their BAH, dependency, beneficiaries, SGLI and emergency data.

Reference (a) PAYMAN
 (b) PERSMAN

Verification Procedures Here is how verification of the BAH, Dependency, SGLI, Beneficiaries and Emergency Contacts works:

Stage	Who Does It/ When	What Happens
1	SPO 1s Week of Nov	<p>Forwards the following forms and worksheets to units:</p> <ul style="list-style-type: none">• Direct Access BAH/Dependency Data Forms• Direct Access Emergency Contact Information Report• Copies of member's SGLI Elections forms (SGLV-8286 & 8286A)• Copy of member's Designation of Beneficiaries (CG PSC-2020D) form <p>Note: If the unit has sufficient administrative capability and maintains Unit PDR copies of SGLI forms and Designation of Beneficiaries forms, this step is unnecessary as the unit can generate the BAH/Dependency Forms and Emergency Contact Information Reports from Direct Access using Command Self-Service access.</p>

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Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts, Continued

**Verification
Procedures.**
Continued

Stage	Who Does It/ When	What Happens	
2	Unit/ Upon Receipt	Forwards all forms and Emergency Contact Reports to the member for verification. Also provides members with blank, or with instructions to access, CG PSC-2020D, Beneficiary Designations form.	
		If a form or report is	Then
		not received for a member or is lost or destroyed.	Use the Direct Access BAH/Dependency Form or Emergency Contacts Report print procedure to generate a new form/report for the member's verification. Provide the member a blank SGLI election form to complete.

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Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts, Continued

Verification Procedures. Continued

Stage	Who Does it	What Happens
3	Member NLT 30 Nov	<ol style="list-style-type: none">1. Completes CG PSC-2020D, Beneficiary Designation form. Forwards original to SPO/SPO, retains copy for Unit PDR if one is maintained.2. Reviews BAH/Dependency Data for accuracy:<ul style="list-style-type: none">• Annotates any necessary changes or corrections.• Signs and dates in the “Members Certification” area.• Returns to SPO, includes CG PSC-2020, BAH Dependency Worksheet, and supporting documentation if adding/removing BAH eligible dependents.3. Reviews Emergency Contact Report for Accuracy:<ul style="list-style-type: none">• Enters any changes or corrections in Direct Access using self-service. Or, if unable to access the system, annotates changes on report and returns to SPO/SPO data entry.
4	SPO	<p>Enter, into Direct Access, any changes or corrections the member noted using the appropriate process:</p> <ul style="list-style-type: none">• <u>Dependent/Beneficiary</u> to add or change information about dependents (Note: Appropriate Direct Access entries must be completed if dependency change impacts entitlements) Generate a new BAH/Dependency for and forwards to member for signature.• <u>Emergency Contact</u> to add or change emergency contact information.• <u>Life and AD/D Benefits</u> to make SGLI election changes (Note: Data entry is only required when member is changing a SGLI/Family SGLI election, i.e. increasing, decreasing or declining coverage. No data entry is required if the member is only updating beneficiary designation.)• Files SGLI forms, BAH/Dependency forms and CG PSC-2020D forms in section 4 of SPO PDR.

Requesting Statements of Creditable Service

Introduction	This will assist you in requesting a Statement of Creditable Service (SOCS) and/or a Statement of Creditable Sea Service (SOCSS).
Procedure for requesting Statements of Creditable Service	<p>This is the procedure for requesting statements of creditable service/sea service on a USCG/USCGR member with a Pay Base Date (PBD), Active Duty Base Date (ADBD) and/or creditable sea pay time problem. You should request a SOCS/SOCSS for the following members who meet these criteria:</p> <ul style="list-style-type: none">• Newly assigned (PCS) USCG/USCGR member with prior service that has not been verified;• Any reserve member entering Extended Active Duty for more than 139 days must have request for a SOCS submitted for ADBD verification regardless of the fact that a SOCS may have been previously completed. <p>Note: Do not ignore suspected sea time errors simply because a member is not currently assigned to a sea pay eligible vessel. Take immediate action.</p>

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Section C
MAINTENANCE OF PERSONNEL INFORMATION

Requesting Statements of Creditable Service, Continued

Procedure for requesting
Statements of Creditable Service,
Continued

Stage	Who Does It	What Happens
1	UNIT	<p>Reviews the member's PDR and any supporting documents the member has, notes the specific period of service/sea service the member is disputing and forwards to the SPO.</p> <ul style="list-style-type: none">Members can help the process by providing any documents they have that substantiate prior service, such as a DD Form 214, any reserve point statements, orders, or a Navy Statement of Service.If a member requests career sea service validation for the purpose of Merchant Marine licensing, be aware that the document required by the Merchant Marines is a Transcript of Sea Service (TOSS) (PSC 1075). Do not confuse this with a SOCSS, because the TOSS will include periods of service aboard vessels not eligible for sea pay/time (see 5-C-9 of this section for requirements on requesting TOSS).
2	SPO	<p>Reviews the Direct Access database to verify whether or not a SOCS has already been completed.</p> <p>Home > Administer Workforce > Administer Workforce (GBL) > Use > Statement of Creditable Service</p> <ul style="list-style-type: none">If a SOCS has not been completed, and it can be verified that the member is not receiving credit for a specific period of <i>prior</i> service/sea service, request a SOCS/SOCSS from PSC (SES) by Memorandum (Memo) and attach all supporting documentation. The Memo request needs to contain the member's full name, EMPLID, service branch, and period of service. <p>VERY IMPORTANT: If there is a DD-214 or other documents supporting creditable service and/or sea service, and the member's pay base date, active duty base date or sea pay longevity is incorrect, the member can request an immediate adjustment.</p> <p><u>The request must be sent to PSC (SES) and must indicate:</u> <u>"The member has been counseled and understands that if the pay base date, active duty base date or total sea time, based on the DD-214, is not supported by the prior service records, the member may be in an overpaid status".</u></p>

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Section C
MAINTENANCE OF PERSONNEL INFORMATION

Requesting Statements of Creditable Service, Continued

Procedure for requesting Statements of Creditable Service, Continued

Stage	Who Does It	What Happens
2 Continued	SPO Continued	Note: Please ensure that periods of Coast Guard sea service or ADT that are in dispute are processed via the SPO transmittal. There is no need to request a SOCS/SOCSS in these instances because the transmitted documents will result in the member's JUMPS account being adjusted correctly.
3	PSC	<p>Is responsible to verify and validate all periods of prior service (all branches) and sea service to adjust a member's Pay Base Date (PBD), Active Duty Base Date (ADBD) or cumulative sea service time.</p> <ul style="list-style-type: none">• With supporting documentation by the SPO, makes interim adjustment to member's service dates and/or sea service time. The member must provide a statement indicating that the interim adjustment may put him/her in an overpaid status (as discussed in stage 2 on previous page).• Request records from Headquarters or from the appropriate record center (if applicable).• Verifies dates.• Issues member a SOCS (PSC Form 1071) and/or a SOCSS (PSC Form 1072).• Makes necessary adjustments to member's pay account. <p>Note: Completing the process can take from 3 to 6 months, depending on how quick the other Service responds to the request. The most difficult part of this process is retrieving the necessary information needed from the other Services. Please allow 90 days for processing of SOCS/SOCSS requests by PSC before submitting any follow-up or tracer requests.</p>
4	SPO	<p>Once the SOCS/SOCSS has been forwarded to the SPO, ensure a copy is retained in the SPO PDR, and forward a copy to the unit requesting verification.</p> <p>Note: If the original SOCS/SOCSS is found to be in error, because of an incorrect date or missing period of service/sea service, please forward the original SOCS/SOCSS with all documentation to PSC (SES) by memo, with the periods in dispute clearly addressed.</p>
5	UNIT	<p>After PSC completes the SOCS/SOCSS and the SPO forwards the package to the unit, the member should be made aware of the impact the SOCS/SOCSS will have on his/her PBD, ADBD, or cumulative sea service. Member should also be aware that a credit or debit to his pay will probably occur due to the change in his/her PBD, ADBD, or cumulative sea service.</p> <p>Note: Unit should ensure member understands and agrees with SOCS/SOCSS and then notify SPO by deadline date contained in the letter.</p>

Personnel Data Information File (PDIF)

Introduction	The Personnel Data Information File (PDIF) is a Direct Access generated summary of personnel data.
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When will units receive a PDIF	<p>Units can expect a PDIF to be provided by the SPO at the following times:</p> <ul style="list-style-type: none">• Within 5 working days after a member reports in PCS• Upon the request of the unit
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Note: If you are not receiving the PDIFs for all of the members assigned to your unit, contact the SPO and ask them why you are not receiving them.

SPO to Unit Transmission	The SPO has the ability to send PDIFs to the unit via E-mail or by printed copy via regular mail. Units should inform their SPO which method is preferred.
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Personnel Data Extract (PDE)

Introduction The Personnel Data Extract (PDE), CG-4902, is periodically produced by **Direct Access** and provides important personnel database information.

The PDE The PDE is provided to give the member a description of all the items in the database concerning the next servicewide exam cycle or warrant officer appointment cycle. It is issued prior to each active and reserve exam cycle.

Upon receipt Follow these rules upon receipt of a PDE.

If	Then
no errors are found,	member signs and returns to unit
errors are found or suspected,	forward to the SPO with necessary supporting documents

Note: Responsibility for verification of PDE information rests solely with the member through the assistance of the command.

Security Clearances

Introduction	This has been provided to help you locate the policies and procedures for maintaining personnel security clearance information.
Reference	(a) PERSEC, Chap. 2, Administrative Procedures.
Personnel Security Record	When the Central Adjudication Facility (CAF) makes a favorable security determination, notification is made via Direct Access updates and by a certificate of clearance known as the source document. This source document shall have a properly executed SF-312 and CG-5588 attached and is filed in the member's PDR.
Preparation and Maintenance of Security Documents	Policies and procedures governing the preparation and maintenance of security documents can be found in the, PERSEC.

Transcript of Sea Service (TOSS)

Introduction

A Transcript of Sea Service (TOSS (CG PSC-1075)) is used to document service on board Coast Guard vessels for the purpose of obtaining a Merchant Marine License. The Transcript of Sea Service lists information regarding a member's sea service, including:

- Names of vessels
- Shaft Horsepower
- Dates the member served on each vessel
- Rank at time of departure from each vessel

Note: This document does not serve to verify creditable sea service for pay purposes (refer to 5-C-3 of this section).

How to obtain a Transcript of Sea Service

If a member desires that a Transcript of Sea Service be prepared, the following must occur:

Stage	Who does it	Action to be taken
1	SPO	Request TOSS (CG PSC 1075) via Memorandum or E-mail and forward to PSC (SES). Note: The request should include the date the member entered the service and a summary of vessels he/she served on.
2	PSC (SES)	Issues CG PSC-1075 within 30 days of the date PSC received the request. The original and a copy are mailed to the SPO.
3	SPO	Forwards the original TOSS to the member and files the copy in SPO PDR.

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